KitapSoft

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Ninova User Manual

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1. Introduction

1.1. Ninova Engineering Document Management

Ninova is an engineering document management system targeting on engineering offices. It has not only unique user interface which is innovative and context sensitive but also Ninova supports engineering processes with customizable data types and comprehensive work-flow.

1.1.1 Feature Overview

Main features of Ninova are as following:

- Multi-user operations thanks to server client architecture
- Customaizable data model through Configurator
    - Create your own document types and assign attributes to them
- Change management through WorkAreas
- Embedded viewer for CAD drawings as well as office documents, pdfs and picture formats
- Revisioning
- Quick and Advanced Search
- Internal notification system which can be integrated to email and sms services
- Reports about the activities on system

1.1.2 Modules

Ninova is delivered with 3 solutions, each targeting on different kinds of users.

Client

Client is the solution which will be used in daily businesses. Users can

- Access the documents in the system
- Manage documents and their properties
- View the document content via embedded viewer without native application installation
- Search documents
- Create reports

Server

Ninova clients need Server component in order to execute user functionalities. Please note that the communication will between client and server is secure.

Ninova server installation can exist in your intranet as well as in cloud servers. For detailed questions please contact your sale agent.

Configurator

You can configure Ninova regarding your company's needs. The main components are

- Manage Document types and their properties
- Manage user title and roles

1.1.3 Installation

Ninova client is compatible with the popular and recent windows versions such as XP(*), Vista, Win7 and Win8.

(*) Please note that XP support is ended on 8th of April 2014 by Microsoft. For secure business, please consider the upgrade.

2. Client

2.1. Login and Main Screens

In login screen, user is able to select the UI language of the client session. After the login, if user would like to change the language, s/he needs to start the session again.

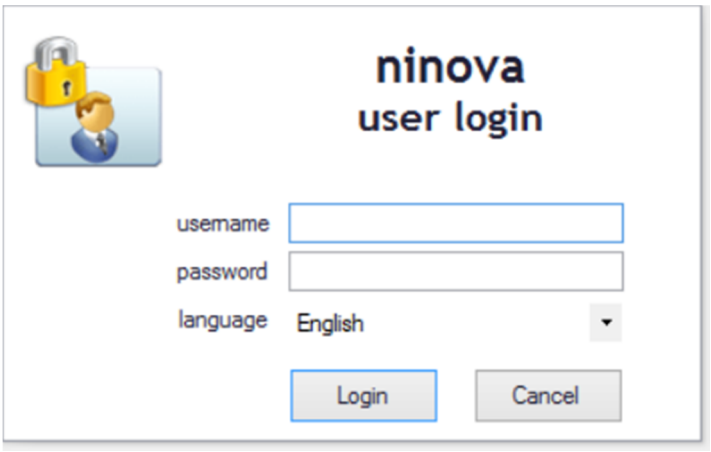

Figure 1: Login screen

When user logs in with the valid user name and password, the titles of the user is shown like in the next UI. This feature is implemented not only for the people who has many titles in a company, but also to handle the proxy titles which are held for a given time period. For more details, please go into the details of Configurator module.

Figure 2: Title selection dialog

Main UI of the client is shown in the next figure.

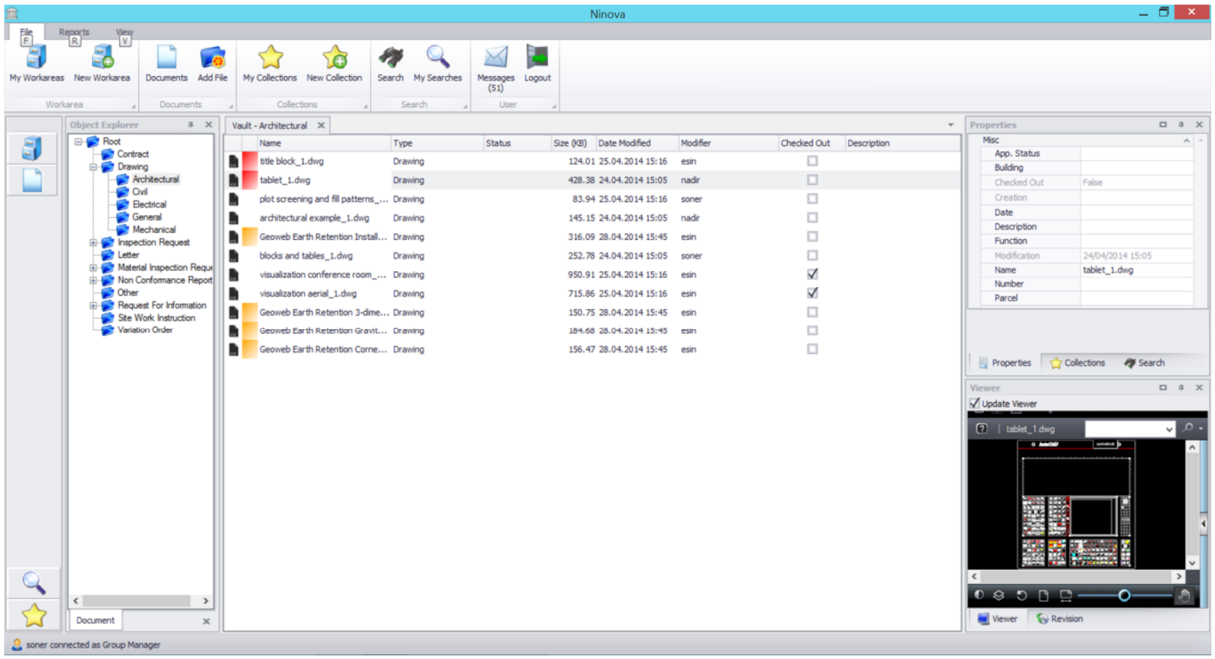

Figure 3: Main screen

2.2. UI Preferences

User interfaces in Ninova are easy to customize. UI elements such as Object Explorer, Search pane, Viewer Pane are all seperatly managable. In the next shot, Viewer pane is separated and can be placed on another screen. User can save the current state or reset to default settings.

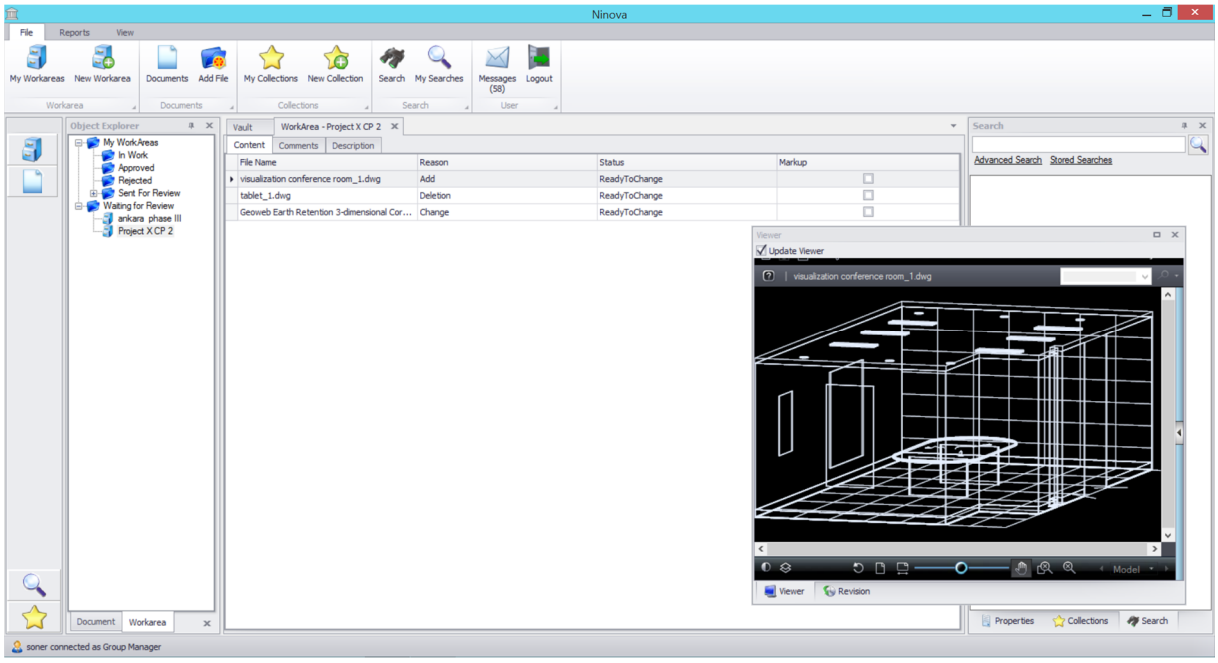

Figure 4: Main screen with undocked pane

User can also select from many look-and-feel modes. This will effect all the panes and tabs automatically. VS2010 look-and feel is shown in the next figure.

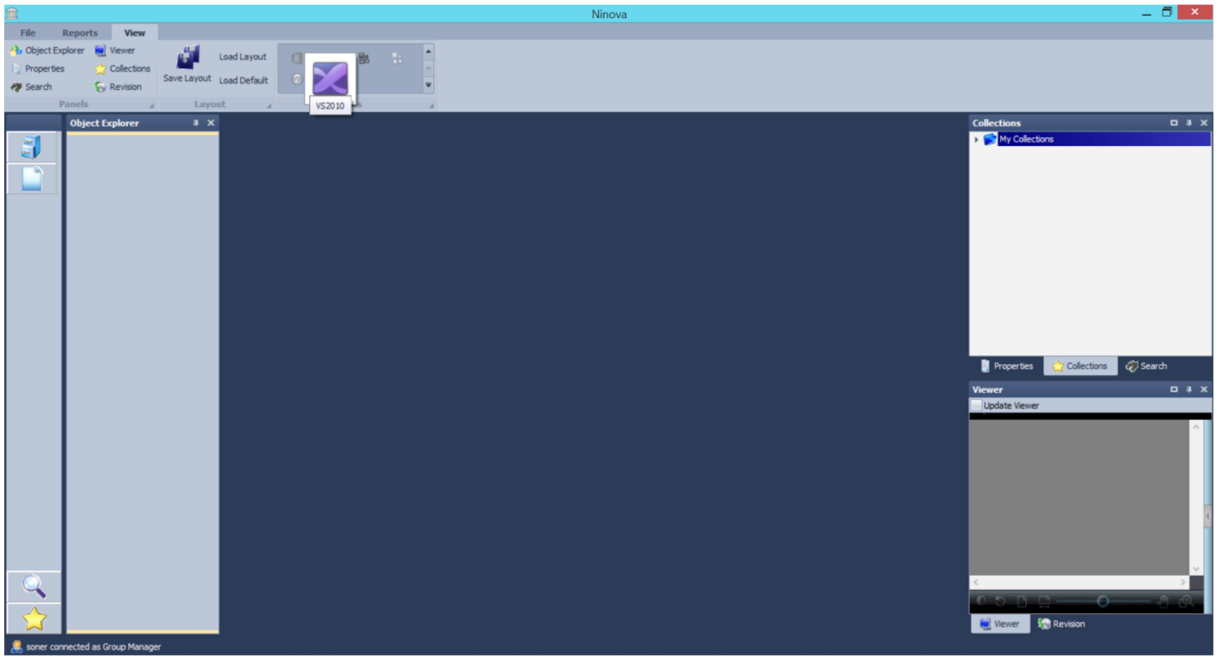

Figure 5: Look and feel change example

3. WorkArea Module

WorkArea is the change management module and the one of the main modules of the Ninova. With the defined work-flow, user is able to

- Add & delete document to/from system
- Change the content of the documents
- Change the properties of documents
- Approve or Reject of the changes which are done in a WorkArea

Now we will look into details of user operations for each feature.

3.1. Create a WorkArea

Create WorkArea page on the “Object Explorer” with a click on the WorkArea icon.

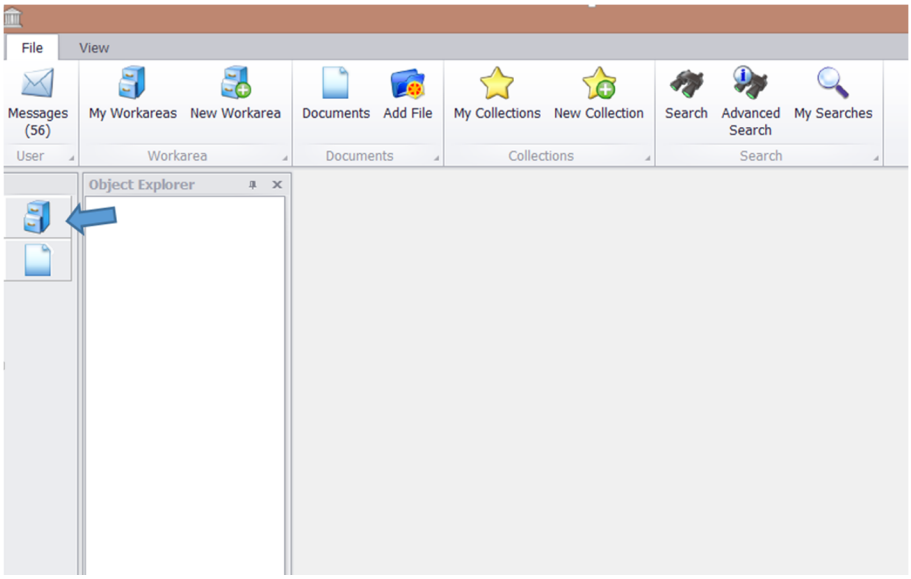

Figure 6: Explore WorkAreas

With right click; select “Add New WorkArea”

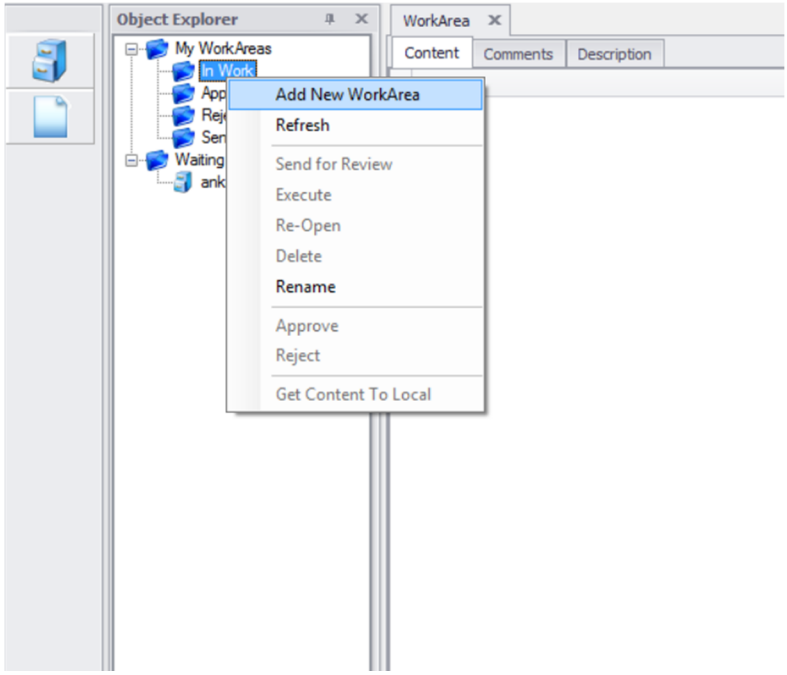

Figure 7: Create a new WorkArea

Enter a name and a description for the WA in the dialog and confirm with OK. If a WorkArea does not have a description, it can't be sent to Review. Your WA will be created and selected in the object explorer.

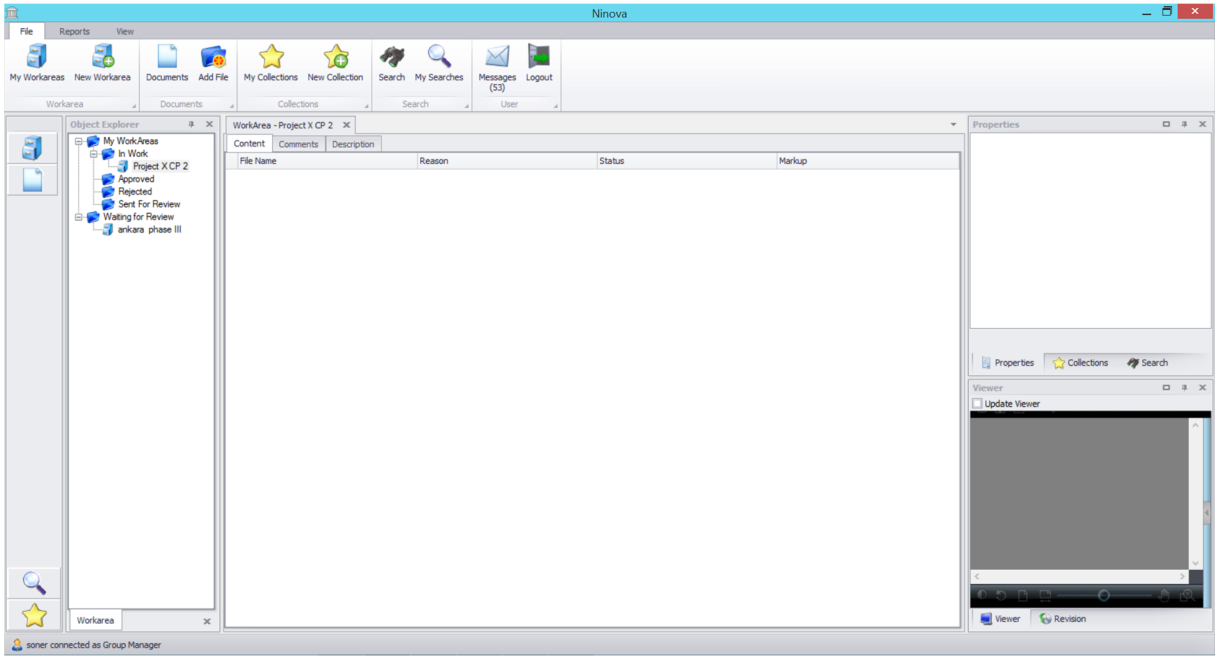

Figure 8: View of a newly created WorkArea on Content Page

3.2. Add Documents to WorkArea

There are three reasons to add documents to WorkArea.

- Add
  User selects a document from his/her local drive in order to add it to Ninova.
- Change
  User wants to change the content or the properties of a document which is already under the control of the Ninova
- Delete
  User selects a document in Ninova in order to remove it from Ninova.

If you want to add a document to a WorkArea with purpose “Add”, right click in content page. Select “Add Documents To System”.

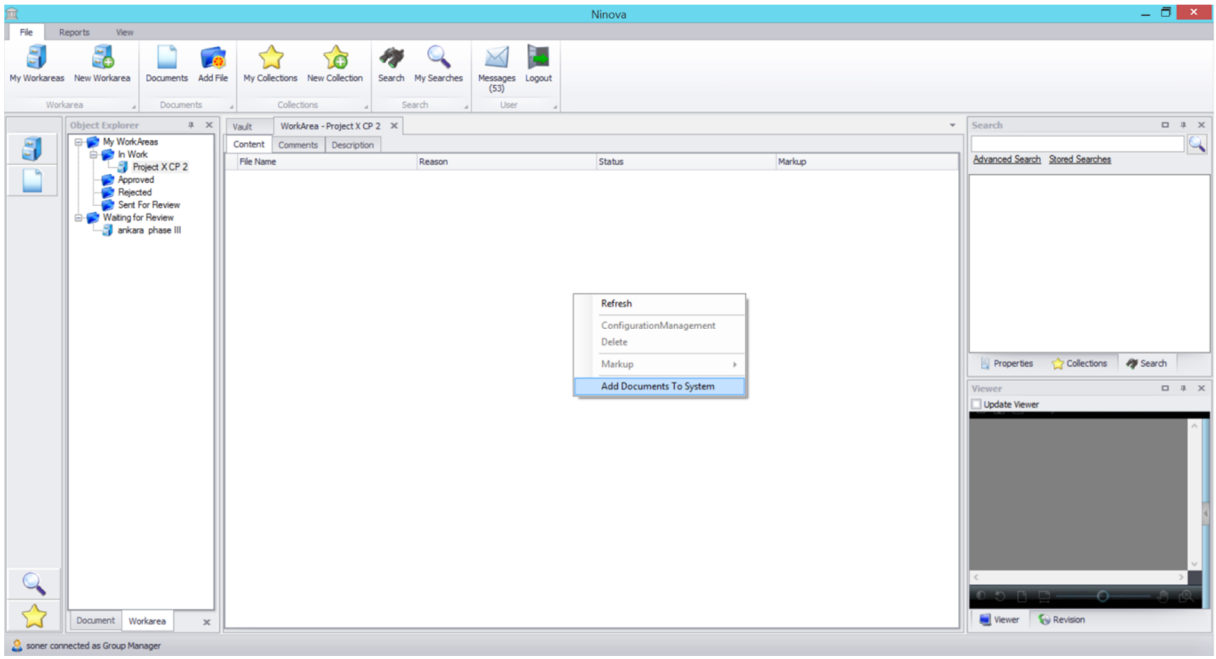

Figure 9: Add new document to WorkArea with Reason „Add“

In the file selection dialog, select the files that you want to add to Ninova.

The selected files will be shown in the Ninova dialog as following

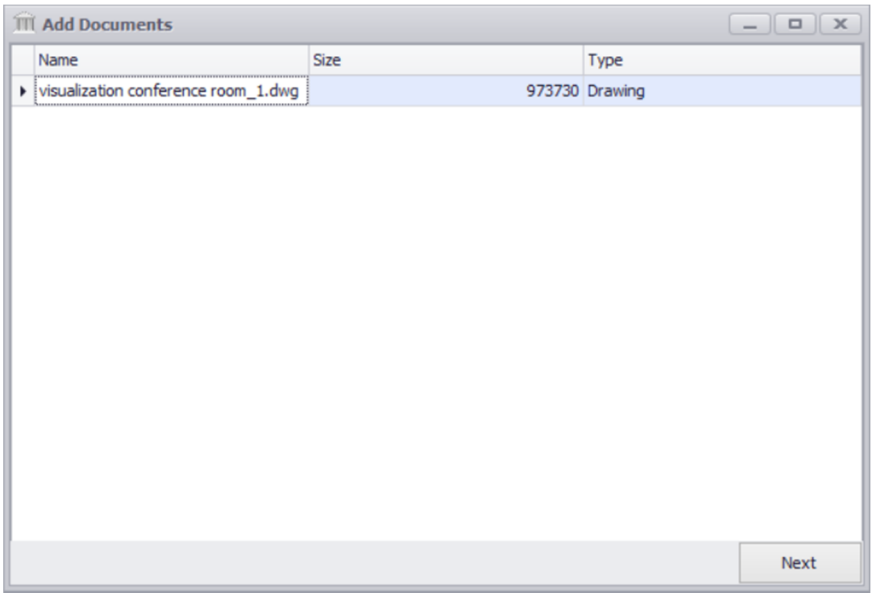

Figure 10: Document type selection dialog

After the type information is selected for whole document list, ***Next*** button will be activated. Pressing ***Next*** will add the documents to WorkArea.

You can change the “Add” documents still in the WorkArea before adding Ninova. This process will not be explained here as it will be explained in the chapter 2.1.2

Adding documents to a WorkArea with purpose “Change” and “Delete” is done in Vault content page. User needs to first right click on the document; then “Send to”.

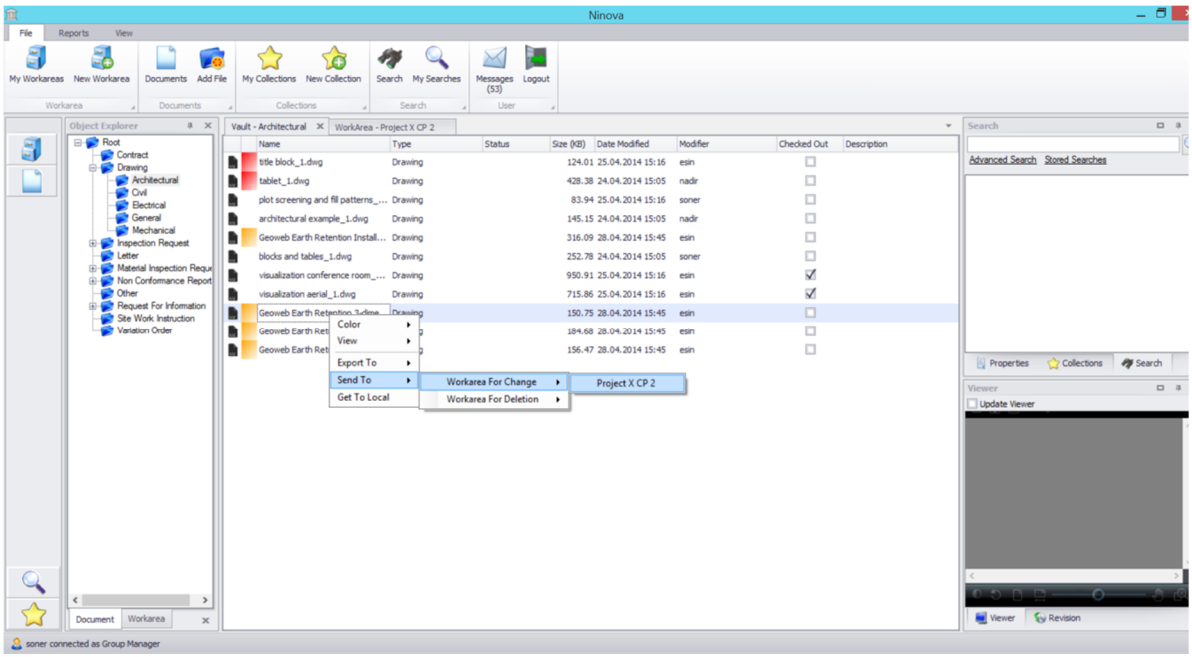

Figure 11: Add documents to a WorkArea with Reason „Change“ and „Delete“

Here is the example of a WorkArea which has 3 elements in it.

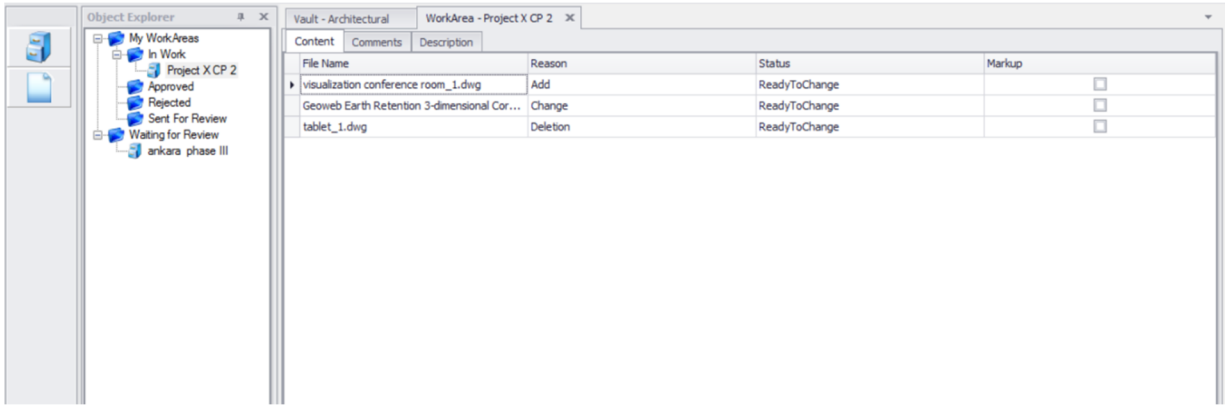

Figure 12: Overview of example WorkArea

3.3. Change documents & its properties

User can select the document in the content page of the WorkArea and can check out the files. After check in, the content will be changed in WorkArea itself. Please note that the changes will be available for other first when the WorkArea is executed.

3.4. Delete documents from Ninova

In order to delete a document, the document needs to be added to WorkArea with purpose "Delete". Please note that the document will be deleted first when the WorkArea is executed.

3.5. Send WorkArea to Review

When user decides to proceed with the WorkArea, s/he has to send it for review. To do that, select WorkArea in "Object Explorer" area and from right click menu select "Send for Review". Please note that Description area can't be empty if you want to send it for review.

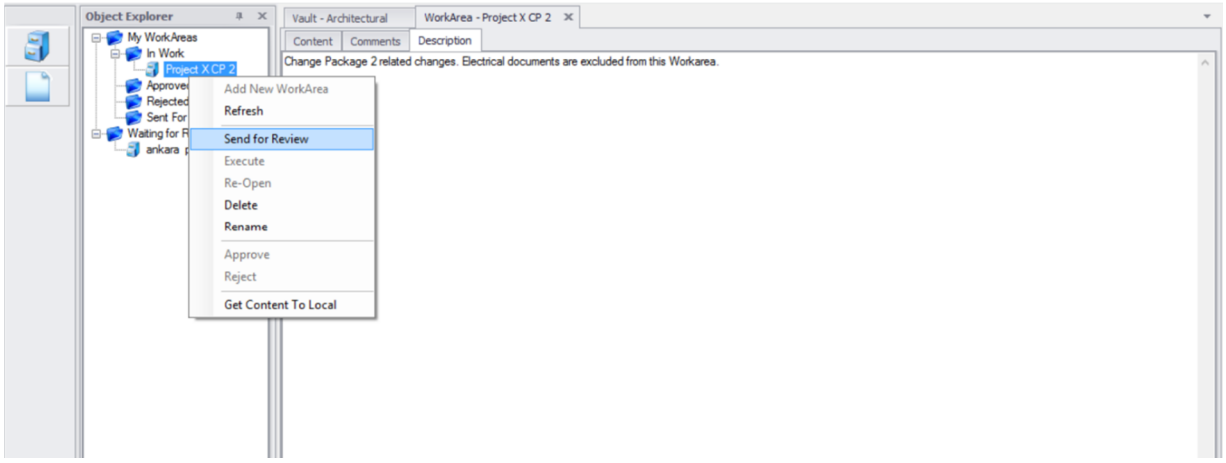

Figure 13: Send WorkArea to Review

Select the reviewer from the next dialog. Only the users which have the privilege to review will be list in that dialog. Setting privileges to roles and setting roles to titles is the responsibility of the admin using Configurator module.

After this step, reviewer will be notified by Ninova about the WorkArea.

The WorkArea will be shown as following in the owner's WorkArea list.

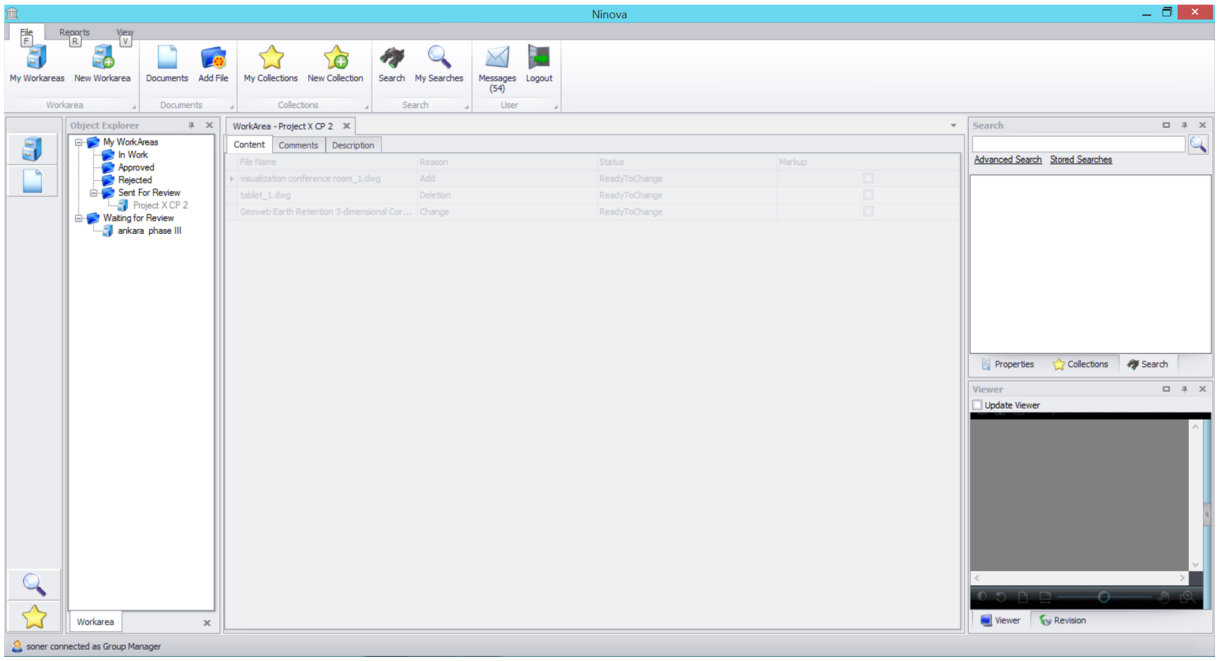

Figure 14: WorkArea waiting for Review

3.6. Reviewing a WorkArea

Every WorkArea must be reviewed and approved before it is executed. Reviewer will see the WorkArea under the folder “Waiting for Review”. Reviewer can download the content of the WorkArea to his/her local drive.

Reviewer can create mark-up file for each document in the WorkArea.

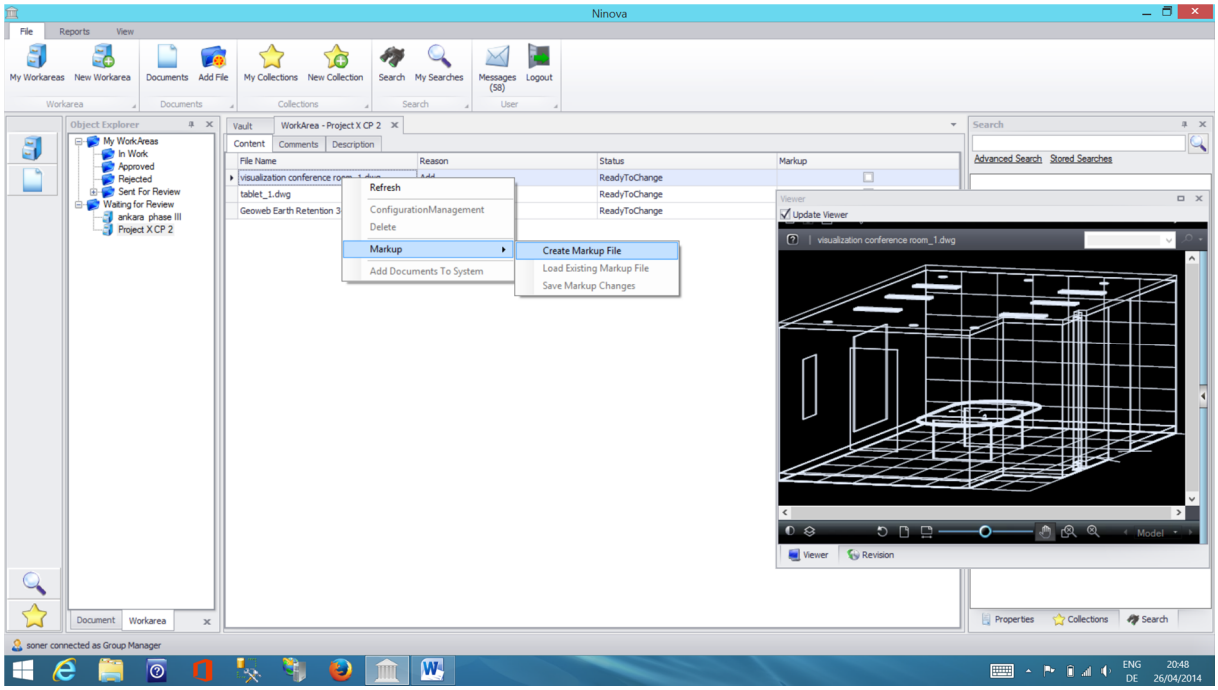

Figure 15: Create markup file

Mark-up dialog on the viewer will be shown as following.

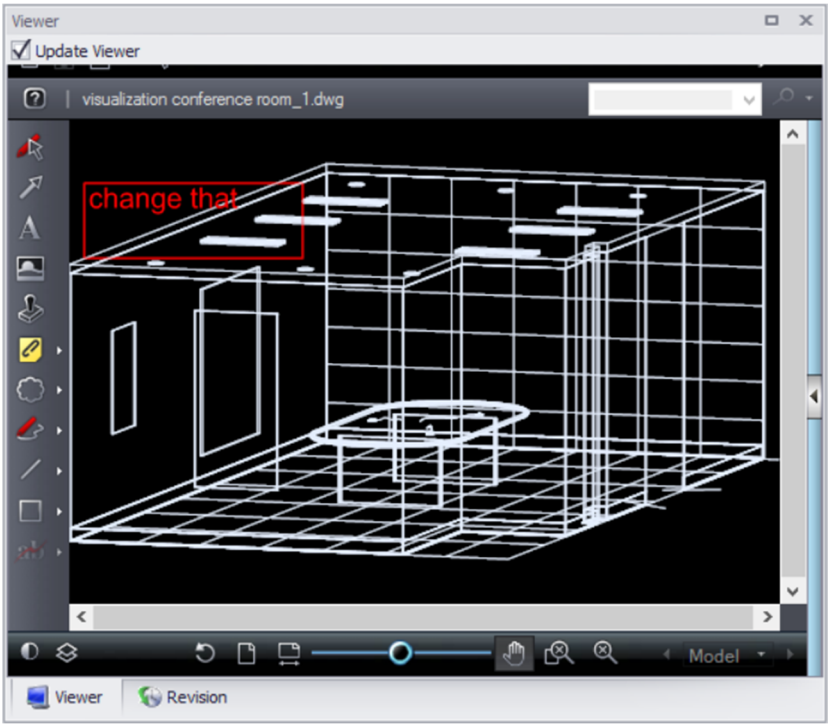

Figure 16: Create markup entities

Reviewer is able to approve or reject the WorkArea. Both operations require user to comment.

3.7. Execute WorkArea

When a WorkArea is finally approved, user can execute it. With that operation Ninova will take different actions with different documents in WorkArea in respect to their purpose.

For the documents which have the purpose “Add” will be added to Ninova system. User will be asked to select a folder for those documents.

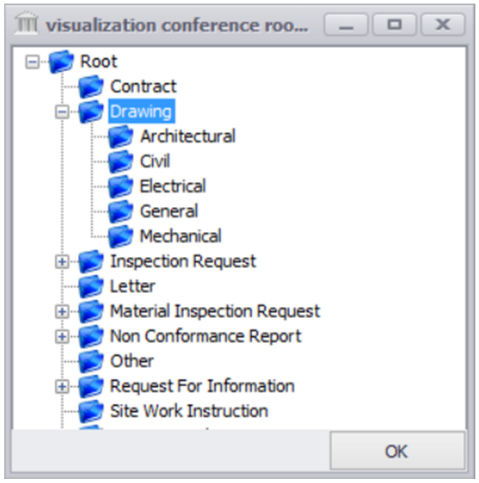

Figure 17: Select folder for documents with Reason "Add"

If a document was in the WorkArea with the purpose “Change”, a new revision will be created for the document.

Those documents with purpose “Delete” will be deleted from among with its revisions.

4. Vault Module

The documents that are managed by Ninova system are accessible using Vault under Object Explorer.

4.1. Structure your documents

You can easily create folder and folder structures in Ninova. You can just open Ninova Vault by clicking Vault icon on the left toolbar.

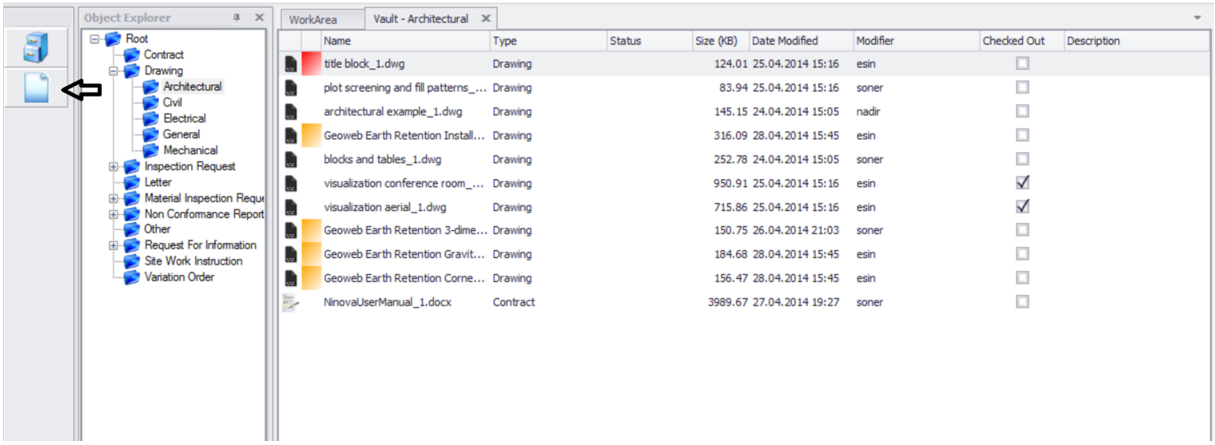

Figure 18: Explore Vault

You create and delete folders in the Vault Object Explorer. Please note that you can not delete a folder which have documents under it. To be able to delete a folder, you should move the folders to another folder.

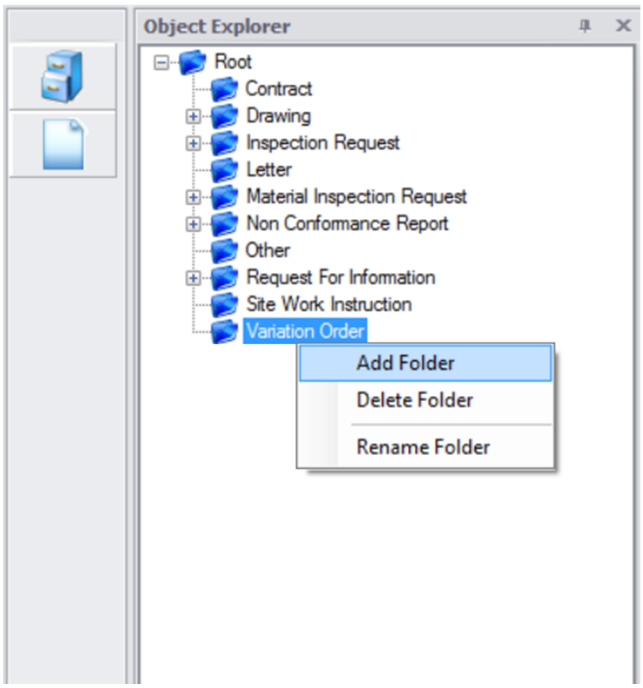

Figure 19: Creating structure under Vault

4.2. Document content page

Documents which belong to one folder will be listed in the Vault Content Area. For each document various attributes are shown there.

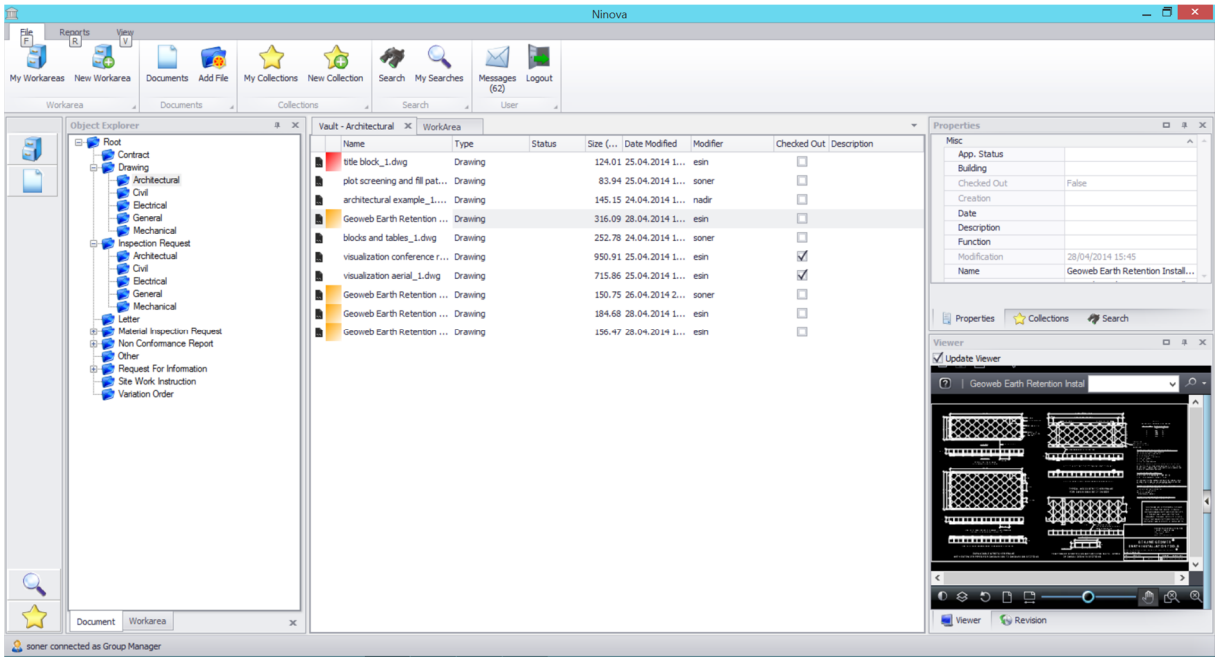

Figure 20: Document content page

Lets see the details of the context menu (right click on vault content page).

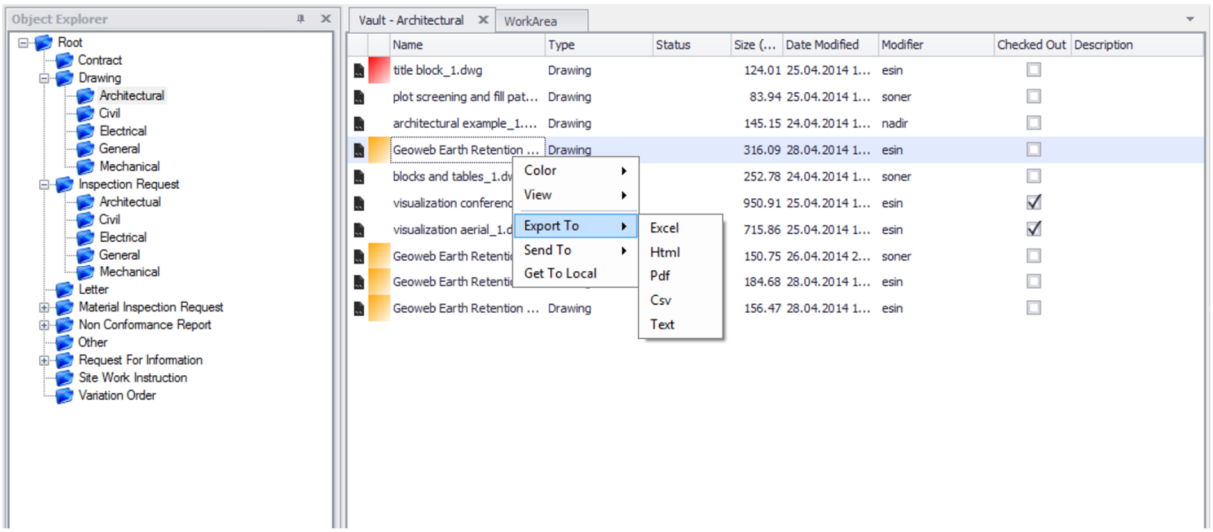

Figure 21: Context menu of Vault content page

Under „Color“, user can assign a color to each document. So user can filter and search using this information.

Under „View“, user can decide how documents will be shown under content page.

Under „Export to“, user can select a file type export the content information into. This is an additional and innovative reporting capability integrated into Vault content page.

Under „Send to“, user will select a reason and workarea to add the selected document to selected workarea.

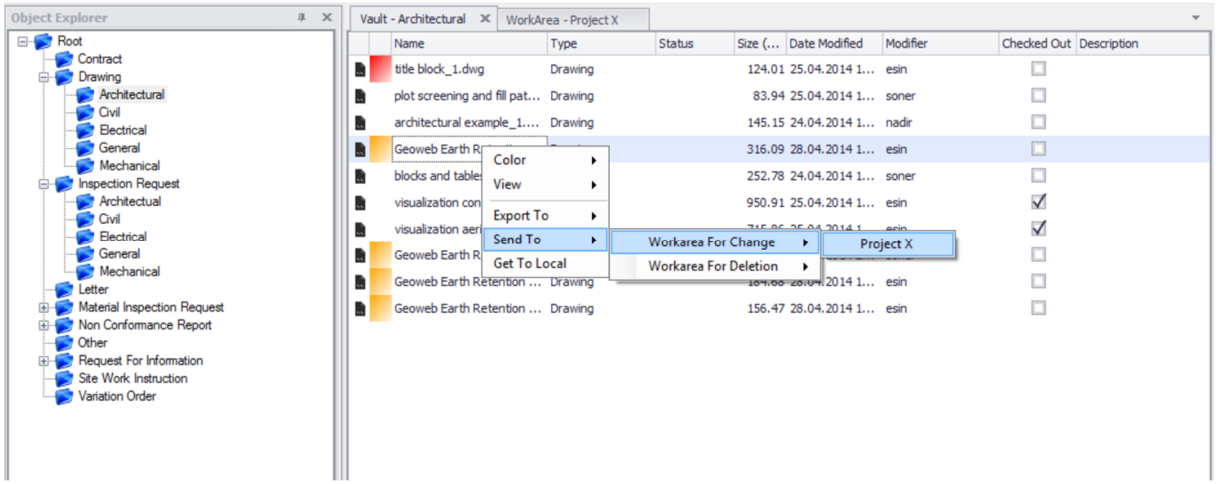

Figure 22: Send a document from Vault to WorkArea

This will add selected document to WorkArea named „Project X“ with Reason „Change“.

5. Search Module

Ninova gives you abilities to make compherensive searches. These searches covers not only the content of your documents, but also the document type related attributes.

5.1. Quick search

Quick search is the simplest search methodology from Ninova. User shall type the keyword and click search button. Keyword will be searched in

- Full-text indexes
  The content of the documents. Version 1 will support the content search for Office documents as well as notepad files.
- Properties of documents
  Properties are defined for each document type via Configurator. All the properties will be searched.

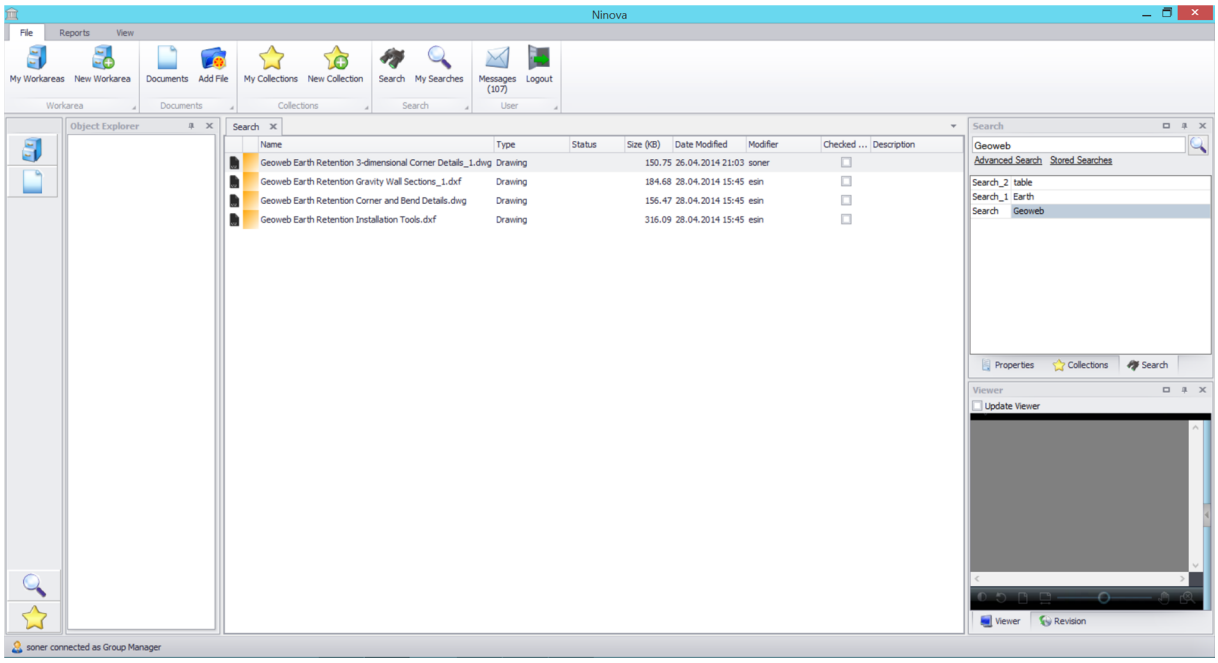

Figure 23: Quick search

Please note that for Office files (Excel, Power Point, MS Word) as well as txt files, the content of the document will also be searched.

5.2. Advanced search

Advanced search gives user to ability to set scope for a search. Advanced search can be also saved for future use.

Example search which is created on the next figure, will search all the document which has name “like” geoweb and created after 1st of April 2014.

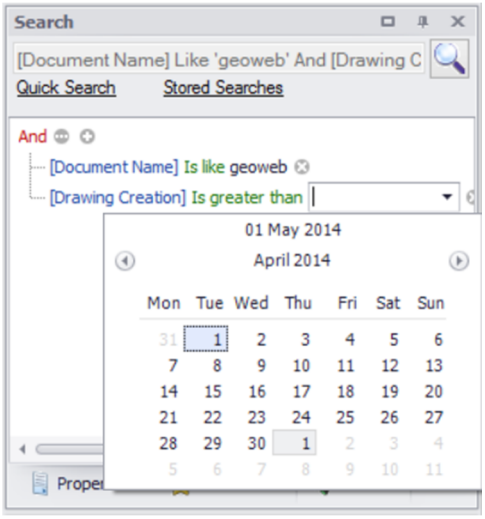
Search
[Document Name] Like 'geoweb' And [Drawing C
Quick Search
Stored Searches
And
[Document Name] Is like geoweb
[Drawing Creation] Is greater than
01 May 2014
April 2014
Mon Tue Wed Thu Fri Sat Sun
31 1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 1 2 3 4
5 6 7 8 9 10 11

Figure 24: Advanced search

6. Report Module

There are three types of report supported by Ninova at the current version. Reports menu can be found next to File menu on the upper most UI area.

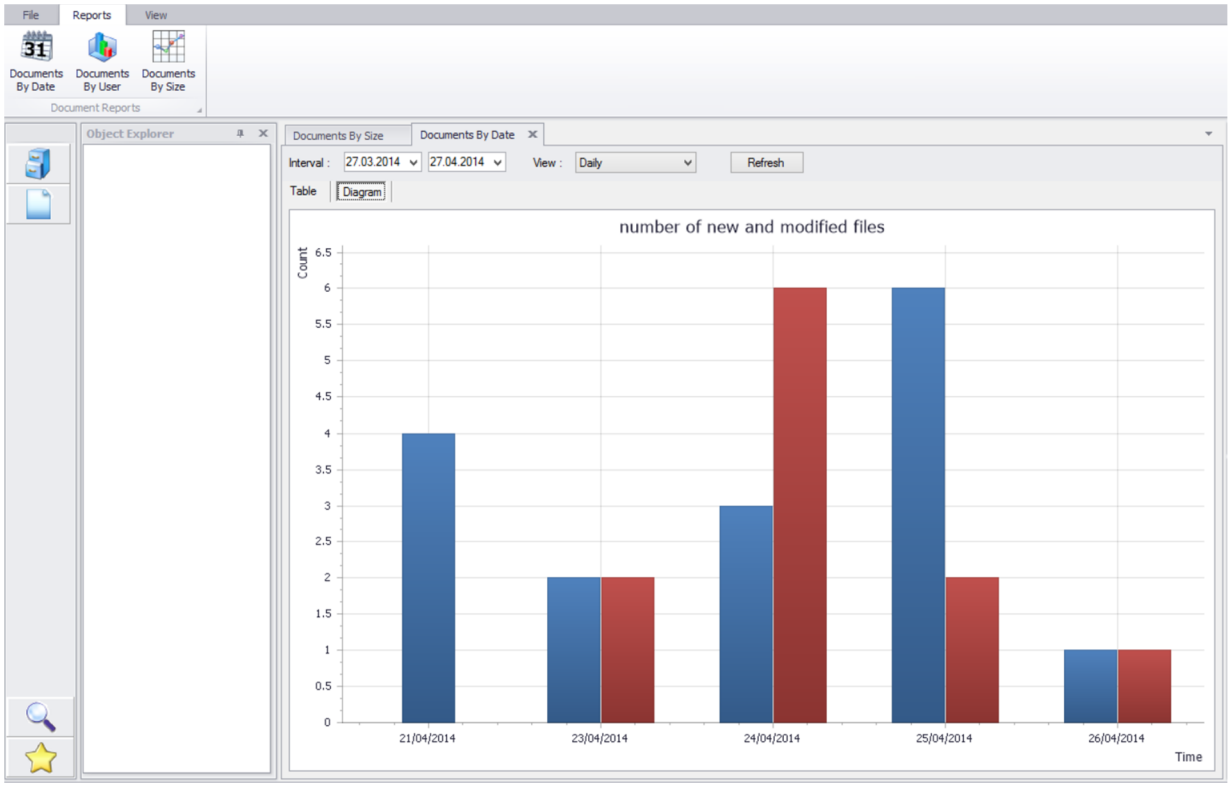

Figure 25: Reports

6.1. Reports by Date

User can create of a report which shows the number of new documents as well as modified documents at a given time range. View of the report can be scaled to daily, weekly and monthly.

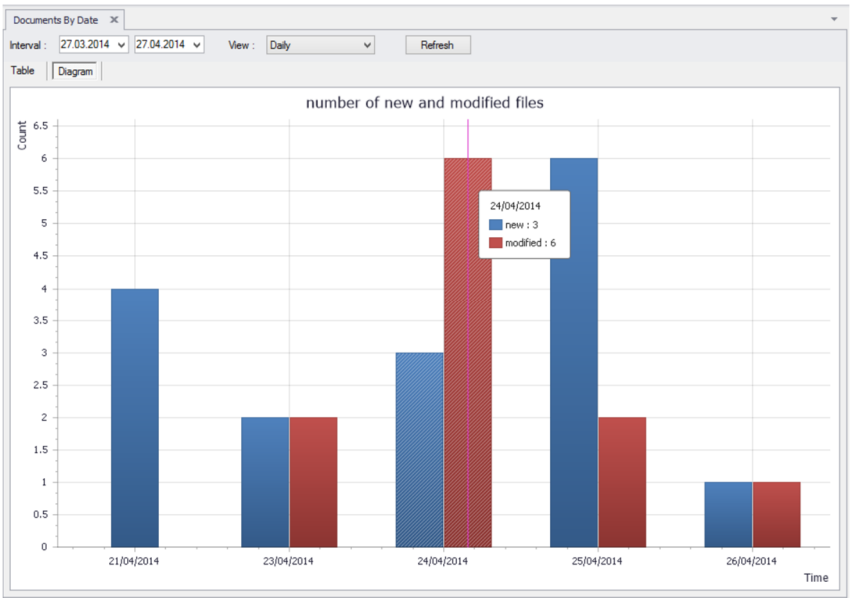

Figure 26: Reports by Date

6.2. Reports by User

Another report can be based on Users. For a given time range, users and their operations can be reported.

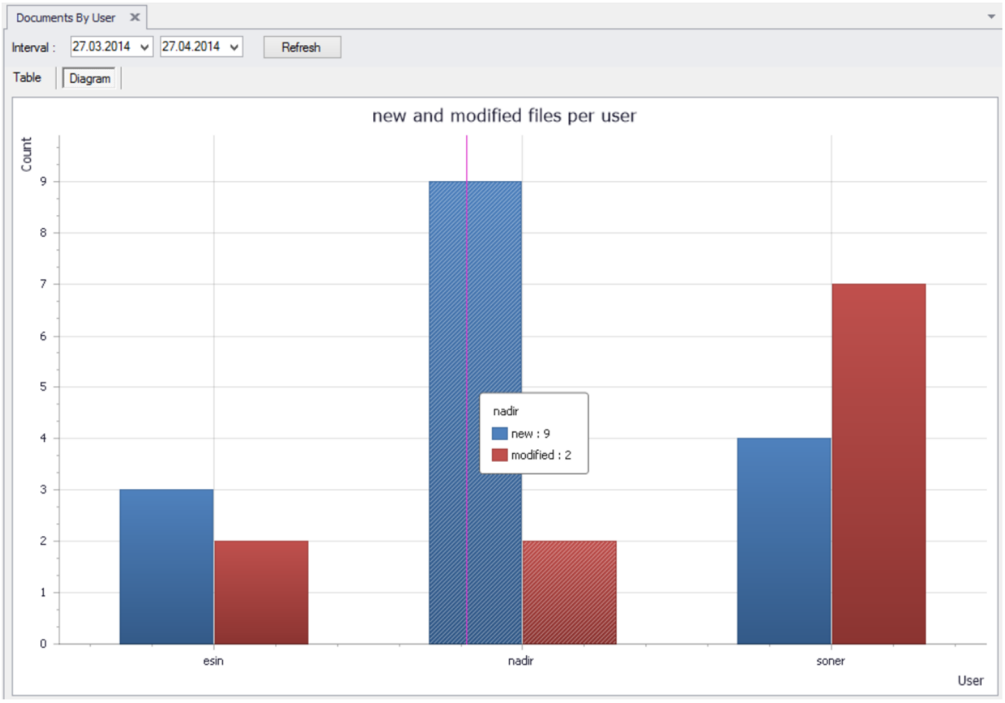

Figure 27: Reports by User

6.3. Reports by Size

Ninova can also report the number of documents according to their size categories.

7. Collection Module

User can create his/her own collection. Collections can be structured also using the folders.

7.1. Create collection

Creation of the collection shall be done on the collections pane.

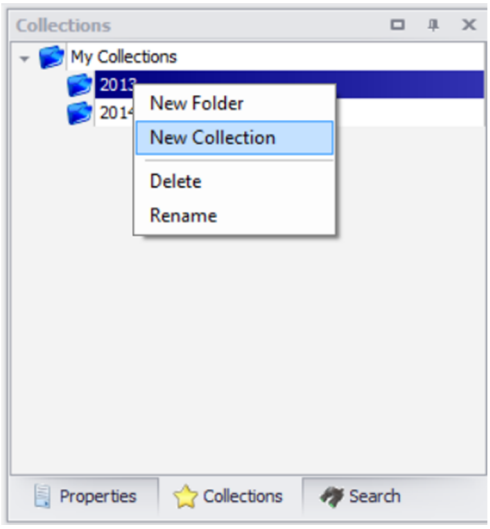

Figure 28: Create a Collection

User can put the documents to a collection by drag and drop from Vault content page to collection content page.

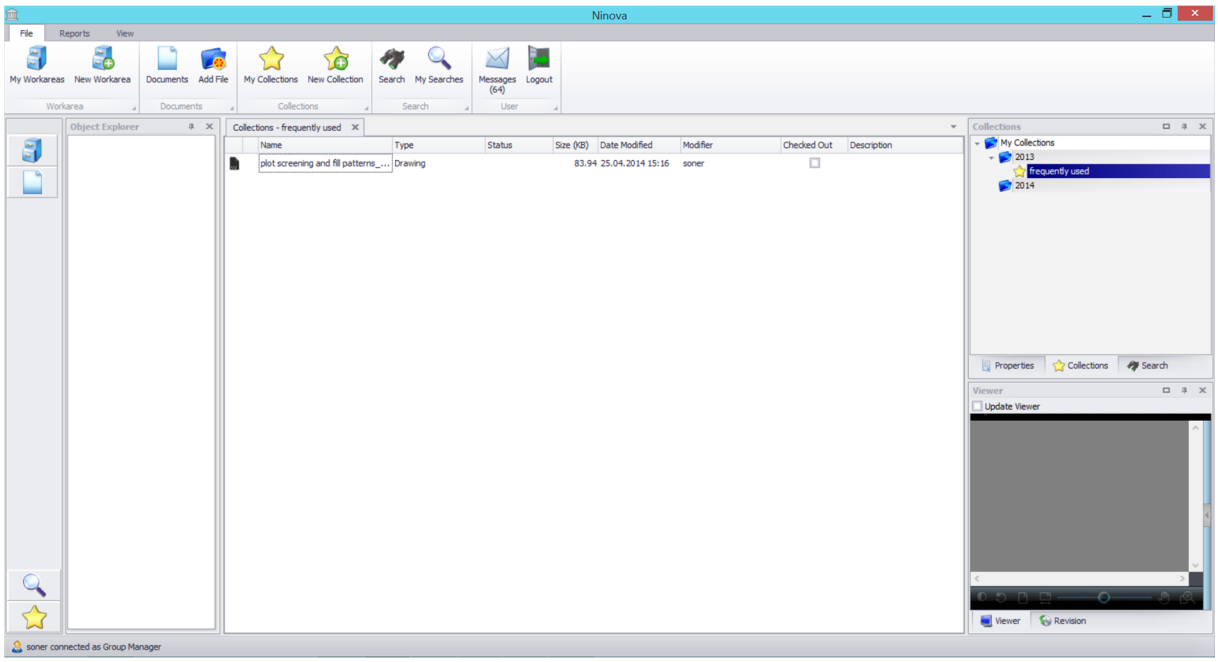

Figure 29: Add document to a collection

8. Abbreviations

EDM	Engineering Document Management
WA	WorkArea
CAD	Computer Aided Design